

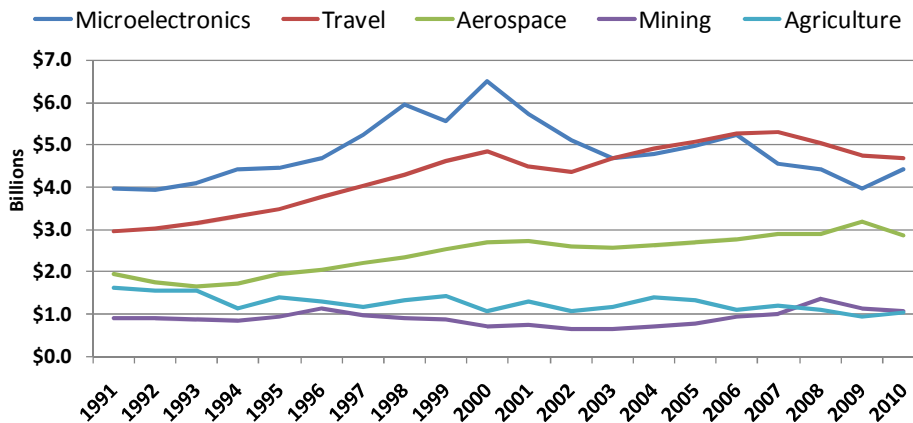
# Tourism Works for Arizona

*The Power of Travel*

## Arizona Tourism Industry Economic Impact

- No other Arizona industry produces the same economic impact for the Grand Canyon State as the Arizona tourism industry.
- Tourism is Arizona's top export-oriented industry and directly impacts all 15 counties. By generating thousands of jobs, millions of dollars in earnings, and billions of dollars in tax revenues, tourism is vital to Arizona's economic vitality.
- Tourism is a driving force in establishing the "quality of life" message and amenities that are necessary to make Arizona an attractive place to live, work and visit.
- Widely recognized as a blue-chip industry, Arizona's tourism industry provides a stabilizing and diversifying affect on local and state economies. The table below illustrates a 20-year perspective on annual earnings generated through tourism, displaying a consistent growth and contribution to the state's economy.

### Annual Earnings, Selected Arizona Export Industries 1991-2010 Constant (2010) Dollars



## Arizona Office of Tourism's (AOT) Impact on the State

- AOT brands Arizona as a premier leisure travel destination. This type of marketing activity brings new money into the state, enhancing the total economic impact of the Arizona tourism industry.
- AOT is a research-driven agency that makes marketing decisions based on what will generate the biggest return on investment for Arizona residents. For each \$1 spent, AOT generates \$8.50 in state and local taxes.
- To remain competitive for visitor dollars in the global tourism market and to increase the economic impact from this dynamic industry, it is vital that AOT continues to brand and market Arizona as a premier travel destination to bring even more travelers to the state.
- AOT continues to demonstrate success in effectively using state funds to market Arizona. Tourism is a fiercely competitive global industry. Tourism budgets from destinations outside of Arizona are increasing overall and new competition for those extremely valued traveler dollars emerges every day.

## By The Numbers

*All Data 2010*

**36.9 Million:** Number of domestic and international overnight visitors who experienced Arizona as a travel destination.

**4.7 Million:** Number of international overnight visitors to Arizona, including Mexico and Canada.

**\$17.7 Billion:** Amount of direct traveler spending generated within Arizona.

**\$48 Million:** Amount of direct traveler spending being contributed to our state's economy every *single* day.

**152,200:** Number of industry related jobs directly generated by traveler spending. When combined with indirect employment, direct traveler spending impacts, nearly 300,000 jobs.

**\$4.7 Billion:** Amount of earnings generated by Arizonans employed by tourism jobs.

**\$2.5 Billion:** Amount of local, state and federal tax revenues generated as a result of direct traveler spending.

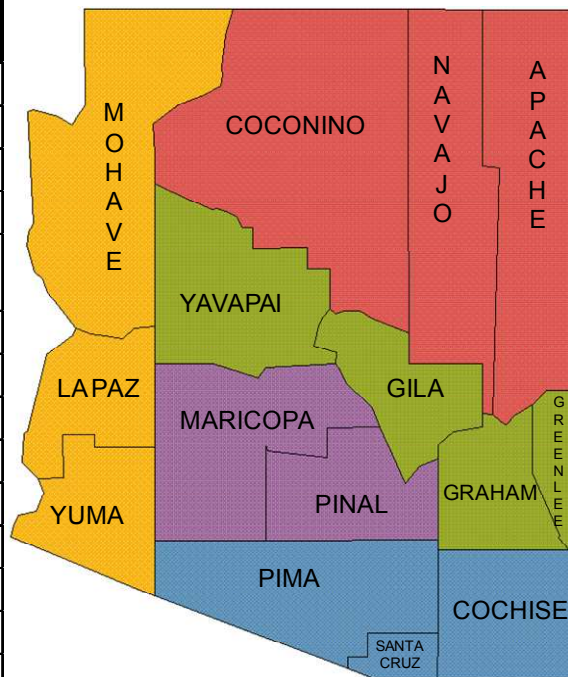
**\$1,040:** Tax revenue generated by the tourism industry lessens the tax burden by \$1,040 for *every* Arizona household.

**No. 1:** Where the travel and tourism industry ranks among Arizona's export-oriented industries.

**#14:** Arizona ranks #14 with 2.9 percent of the domestic U.S. visitation in comparison to other states.

## Arizona Tourism Economic Impact by County

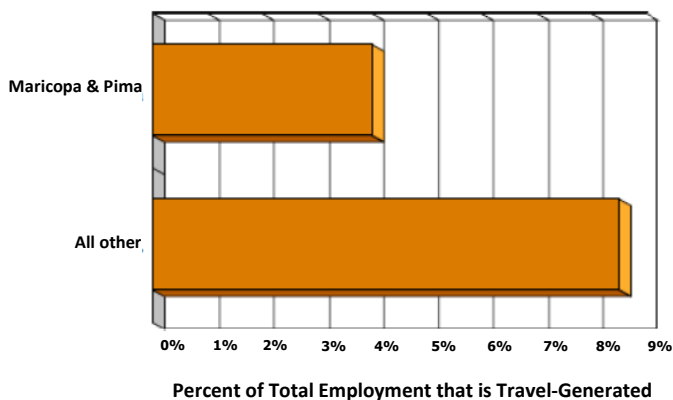
County	Direct Traveler Spending	Jobs Generated	Earnings Generated	Taxes Generated
Apache	132.1 M	1,610	\$29.7 M	\$8.2 M
Cochise	\$339.6 M	4,130	\$78.5 M	\$24.9 M
Coconino	\$974.8 M	10,500	\$265.5 M	67.0 M
Gila	\$222.5 M	2,530	\$55.1 M	\$8.9 M
Graham & Greenlee*	\$43.2 M	990	\$10.9 M	\$3.0 M
La Paz	\$191.5 M	1,100	\$27.3 M	\$9.9 M
Maricopa	\$11.2 B	82,910	\$3.1 B	\$679.8M
Mohave	\$438.9 M	4,650	\$98.8 M	\$27.9 M
Navajo	\$269.9 M	2,930	\$64.9 M	\$16.3 M
Pima	\$2.0 B	21,520	\$509.0 M	\$124.1 M
Pinal	\$482.6 M	4,230	\$119.8 M	\$28.3 M
Santa Cruz	\$235.4 M	1,660	\$41.3 M	\$12.9 M
Yavapai	\$648.3 M	7,650	\$170.4 M	\$37.4 M
Yuma	\$565.7 M	5,770	\$139.9 M	\$36.3 M



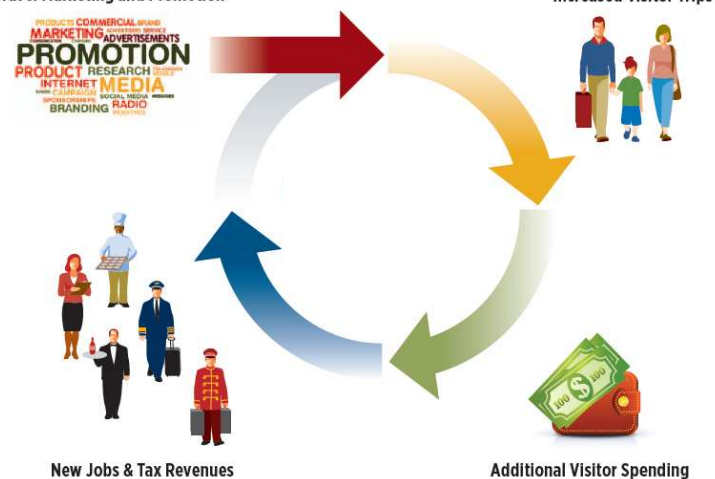
\* Graham and Greenlee Counties have a combined economic impact in regards to tourism.

- The chart above displays the amount of direct traveler spending by county, along with the number of jobs, earnings and taxes directly generated as a result of visitor spending.
- The color-coded map reflects the marketing regions developed by the Arizona Office of Tourism: Gold, West Coast; Red, Northern; Green, North Central; Purple, Phoenix & Central; Blue, Tucson & Southern. These regions are used strictly for advertising and promoting purposes.
- The graph below, to the left, shows that approximately 70% of all travel-generated employment occurs within Maricopa and Pima counties. However, in relation to the size of the regional economies within Arizona, travel employment is actually more significant in the non-metropolitan areas of the state where manufacturing industries are less prevalent. Spending by visitors generates sales in lodging, goods and services, recreation, transportation and retail businesses. These sales support jobs for Arizona residents and contribute tax revenue to local and state governments.
- The graph below, to the right, highlights the importance of destination marketing and the resulting impact of visitor spending.

Travel-Generated Employment as Percent of Total Employment 2010 (projected)



Travel Marketing and Promotion



Sources: Tourism Economics, Longwoods International, 2007-08 Mexican Visitors to Arizona, US Department of Commerce-Office of Travel & Tourism Industries, Statistics Canada, Dean Runyan Associates, Strategic Marketing & Research Inc., U.S. Travel Association

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